

<div style="display: flex; justify-content: space-between; align-items: center;"> SAMPLE Performance and Development Plan SAMPLE </div>		
Purpose of Appraisal: <input checked="" type="checkbox"/> Annual Review <input type="checkbox"/> Trial Service Review <input type="checkbox"/> Probationary Review <input type="checkbox"/> Other:	Employee's Name: (Last, First, MI) Bill Johnson Position Title: Mental Health Technician 2 Identification Number:	Agency: DSHS Organizational Unit: Western State Hospital Evaluator's Name: Jackie Thomas
Performance Period: From July 2004 To June 2005	Position Description Updated: <input checked="" type="checkbox"/>	Date of Preview Session: July 3, 2005
<p>Position Linkage with Organizational Mission and Strategic Plan: <i>What is the organization's mission, and how do the duties and responsibilities of this position link or contribute to the achievement of the mission, goals, and objectives of the organization? Provide brief summary.</i></p> <p>The mission of DSHS is to improve the quality of life for individuals and families in need. We will help people achieve safe, self-sufficient, healthy, and secure lives.</p> <p>This position directly impacts the DSHS mission by providing personal care services and general therapeutic procedures for mentally ill patients at Western State Hospital. This position is responsible to help patients achieve safe, self-sufficient, healthy and secure lives.</p>		
Part 1: Performance Expectations		
Based on the position's major responsibilities, outline the key results and competencies expected of the employee during this performance period. Limit the list to those that are key.		
<p>Key Results Expected <i>What are the most important objectives, outcomes, and/or special assignments to accomplish in order to be successful during this time period?</i></p> <ol style="list-style-type: none"> 1. Patient Safety and Health - Help keep patients safe and healthy. While the environment is sometimes unpredictable, work to minimize safety problems and maximize patients' health success through: being observant of patient behavior and the general climate of the ward; participating in the development and implementation of resident treatment plans; following defined procedures when participating in behavior management incidents; preparing and caring for patients receiving specialized treatments; following defined security/safety procedures; assisting with patient cleanliness, grooming, rest, activity and nourishment. 2. Patient Self-Sufficiency - Help patients become more self-sufficient. This is accomplished through: participating in the development and implementation of patient treatment plans; and providing guidance in cleanliness, grooming, rest, activity, and nourishment. 3. Patient Activities - Assist patients to participate in appointments and recreational, social, and related activities. This is accomplished through: escorting patients to appointments and activities; assisting in coordinating patient appointments; and encouraging, assisting and supervising patients in group or individual recreational, social and related activities. 4. Record Keeping - Create and maintain patient, incident, and ward records as outlined in policies ____ and ____ and procedures ____, ____, and ____. 		

Key Competencies Expected

What are the most important competencies that the employee should demonstrate in order to be successful?

1. Judgement and Problem Solving - Quickly grasps both the obvious and the underlying aspects of situations and problems. Looks beyond the obvious and doesn't stop at the first answer. Seeks advice from people who have successfully solved similar problems.
2. Accountability - Accepts personal responsibility for the quality and timeliness of his work. Believes that the results achieved directly result from his personal decisions and actions. Acknowledges and corrects mistakes. Doesn't make excuses for errors or problems.
3. Teamwork - Fulfills commitments to other team members. Promotes a friendly climate, good morale, and cooperation among team members. Puts team success ahead of individual success. Values all team members. Makes sure that the practical needs of the team are met. Protects and promotes the group's reputation with outsiders. Takes charge when it is necessary to facilitate an action or decision. Creates a feeling of belonging on the team.
4. Patient Interaction Skills - Interacts with patients in a positive manner, treating them respect, kindness and consideration. Secures patient cooperation and confidence.

Part 2: Training & Development Needs/Opportunities

What training and development needs and opportunities should the employee focus on during this performance period?

Learn more about alternative approaches to encouraging and developing patient self-sufficiency by attending the Series 3 Mental Health Technician classes available through the division's training program.

Research, develop and present four new patient recreation ideas at our monthly staff meetings.

Participate in the Ward Security task force for the next performance period. Report results to your supervisor and present summaries to co-workers at the monthly staff meetings.

Attend one of the weekly Nurse - Senior Mental Health Technician meetings with your supervisor in September, November and January to understand the types of issues discussed by this group.

Part 3: Organizational Support

Part 3 is optional and to be completed only by the employee, at the beginning of the performance period.

What suggestions do you have as to how your supervisor, co-workers, and/or agency management can better support you in your present job and future career goals?

I really think regular meetings for all ward personnel would be helpful.

Because I am interested in promoting to a supervisory position, I would like some opportunities to attend higher level training available to us through the division training program.

Acknowledgement of Performance Plan

The signatures below indicate that the supervisor and employee have discussed the performance expectations, and training and development needs outlined at the beginning of the performance period.

Evaluator's Signature Jackie Thomas
10, 2004

Date June

Employee's Signature Bill Johnson
2004

Date June 12,

Part 4: Interim Reviews (Optional)

Part 4 is an optional section that may be used during the course of the performance period to adjust performance expectations if circumstances change, and/or to document interim feedback sessions.

December 2004: No changes to the Performance Development Plan. At this point, no recommendations for patient activities have been made. Mr. Johnson was not able to attend the September or November Nurse - Senior MHT meetings because of conflicts with training and scheduled annual leave. In addition to the January meeting, I would like Mr. Johnson to attend meetings in March and May.

Part 5: Performance Feedback

Provide a narrative assessment of the employee's performance in relation to the Key Results and Competencies Expected that were outlined in Part 1. The assessment must be based on performance observed or verified.

Key Results Assessment

To what degree did the employee accomplish the expected results and how well were they done?

1. During the evaluation period, Mr. Johnson met all expectations as they relate to patient health. He regularly demonstrated genuine concern for patients through his attention to their cleanliness, rest, activities and meals. He participated in the development of treatment plans for six patients during the period, surpassing my expectations. Mr. Johnson accurately followed the treatment plans for all patients assigned to him. Patients receiving special treatments often requested his assistance, as he has gained a reputation for his caring and gentle approach. While this has generally served the ward well during his shifts, Mr. Johnson's lapsed attention to security detail and the defined procedures for behavior management incidents caused three difficult situations to escalate when they could have been easily contained had the correct procedures been followed.
2. Mr. Johnson had several impressive results related to this area during the evaluation period. In four separate incidents, a patient refused to eat an appropriate mix of foods, or refused to eat at all. Mr. Johnson provided persistent and gentle guidance and reassurance to these patients and we saw the eating habits of three of the four return to acceptable norms. Also during the period, Mr. Johnson was involved in implementing patient treatment plans, including self-sufficiency goals, for fifteen patients. Of those, seven did not meet their self-sufficiency goals. My observation is that Mr. Johnson did not apply some of the techniques for teaching self-sufficiency, but often chose to just do the task himself.
3. Patients frequently request Mr. Johnson to escort them to appointments and activities when he is available. There were no reports of appointment tardiness or problems associated with his escort of patients during the period. He enthusiastically encouraged residents to participate in activities, but shows good judgement in determining when and with whom to tone that encouragement down.
4. Mr. Johnson failed to accurately complete his end-of-shift report on 10 occasions in the first half of this evaluation period, leading to a letter of reprimand. Since the reprimand, there have been two more occasions, but none in the last three months.

Key Competencies Assessment

How well (or how frequently) did the employee demonstrate the behaviors, skills, and knowledge expected?

1. Judgement and Problem Solving - Mr. Johnson has proven to be quite adept at applying judgement and problem solving skills to resolve patient complaints and lower level conflicts. I observed a number of instances where he was able to find creative solutions to these problems and head off escalation. As mentioned in section 6A, there were three incidents where Mr. Johnson's application of his own judgement in lieu of following established procedures resulted in the worsening of the incidents.
2. Accountability - Mr. Johnson takes responsibility for his workplace performance. In my review of the security incidents mentioned above, Mr. Johnson fully admitted his part in the problem and demonstrated great concern to resolve those problems. He responded in the same manner to our discussions about his record keeping errors.
3. Teamwork - I've observed Mr. Johnson to be friendly with all ward staff, and have overheard him offering assistance to others ("let me know if there is anything I can do to help...") on numerous occasions. During the evaluation period, he organized a "Mariner's Game Night" for all ward staff, which was well received and well attended.
4. Patient Interaction - Mr. Johnson has demonstrated exemplary ability in the area of patient interaction. In my conversations with ward residents, I often hear how much they like Bill, and/or appreciate his treatment of them. He has often been able to get cooperation from a resident who has not been cooperative with other MHTs.

Other Relevant Information: (optional)

Comments and Signatures

This report is based on my best judgment.

Evaluator's Signature Jackie Thomas

Date July 25, 2005

This report has been discussed with me.

Employee's Signature Bill Johnson

Date July 25, 2005

Comments:

I have reviewed this report and, in my judgment, the process has been properly followed. In addition, the following comments are offered concerning the employee's performance.

Reviewer's Signature Lisa McNamere

Title Ward Manager

Date July 26, 2005

Comments:

NOTE: Once the performance evaluation is completed and signed by all parties, it is the Evaluator's responsibility to provide a copy to the employee and to ensure that the original is placed in the employee's personnel file.